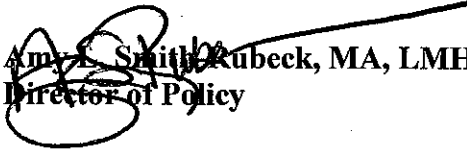




INDIANA
WORKFORCE
DEVELOPMENT

FORMAL COMMUNICATION

TO: Regional Workforce Boards
Regional Operators
Indianapolis Private Industry Council
Directors of Operations for Northern & Southern Indiana
All WorkOne Managers
All WorkOne Staff

FROM:  Amy L. Smith-Rubeck, MA, LMHC
Director of Policy

DATE: May 12, 2008

**Technical Assistance Bulletin
TAB 2007-15
Inclusions & Exclusions for Determining Family Income**

Purpose

To provide guidance on inclusions and exclusions in the calculation of family income as necessary to determine eligibility for workforce investment programs

Content

The Indiana Department of Workforce Development has developed the attached document to aid service providers and field staff in determining items to be included or excluded in the calculation of family income. These calculations may be necessary in order to determine eligibility for the Workforce Investment Act Youth program and the provision of occupational skills training services when local areas have determined that funding for such services is limited.

Any questions regarding the content of this Technical Assistance Bulletin should be directed to:

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2007-11	Clarification of the Co-Enrollment Process and Initial Service Planning
2007-10	Additional Clarification of IC 22-4.5-7-6, IC 22-4.5-7-7 and IC 22-4.5-7-8 Restrictions on Regional Workforce Board Members, Regional Operators, and Service Providers
2007-09	Selective Service Registration
2007-08	Clarification of IC 22-4.5-7-6, IC 22-4.5-7-7 and IC 22-4.5-7-8 Restrictions on Regional Workforce Board Members, Regional Operators, and Service Providers
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2006-07	Guidance from the U. S. Department of Labor
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2006-01	Clarification on DWD Communication 2005-26 (rescinded 8-22-07)
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Attachment

Inclusions and Exclusions for Determining Family Income

Included in Family Income

- Any money, wages, and salaries before deductions (payments for work performed, where there is an employer/employee relationship, would be considered “wages” and therefore, included as income for Workforce Investment Act eligibility purposes)
- Net receipts from non-farm self-employment (receipts from a person’s own unincorporated business, professional enterprise, or partnership after deductions for business expense)
- Net receipts from farm self-employment (receipts from a farm which one operates as an owner, renter, or sharecropper, after deductions for farm operating expenses)
- Regular payments from railroad retirement, strike benefits from union funds, Workers’ Compensation and training stipends
- Alimony
- Military family allotments or other regular support from an absent family member or someone not living in the household, but not child support
- Pensions whether private or government employee (including military retirement pay)
- Regular insurance or annuity payments
- College or university grants (excluding Pell grants), fellowships, and assistantships
- Dividends, interest, net rental income, net royalties, periodic receipts from estates or trusts
- Net gambling or lottery winnings
- Social Security Disability Insurance (SSDI) payments (Title II of the Social Security Act, Federal Old-Age, Survivors and Disability Insurance)

Not Included in Family Income

- Regular payments from Old-Age and Survivors Insurance (OASI) benefits received under Section 202 of the Social Security Act
- State and federal Unemployment Insurance compensation
- Supplemental Security Income Insurance (SSI), Title XVI of the Social Security Act, for the Aged, Blind, and Disabled
- Needs-based scholarship assistance
- Financial assistance under Title IV of the Higher Education Act (Pell Grants, Federal Supplemental Educational Opportunity Grants and Federal Work Study, PLUS, Stafford and Perkins loans) are debt and not income
- Child support payments

Not Included in Family Income (Attachment continued)

- Cash welfare payments under a Federal, State or local income based public assistance program (e.g., Temporary Assistance for Needy Families (TANF), Emergency Assistance)
- Refugee Assistance (Refugee Assistance Act of 1980)(PL 97-212)
- General Assistance (Trustee Assistance) – does not include vouchers issued by the Township Trustee
- Foster care payments
- Non-cash benefits such as employer-paid fringe benefits, food or housing received in lieu of wages, Medicare, Medicaid, food stamps, school meals and housing assistance
- Cash payments received under Title V of the Older Americans Act
- Allowances, earnings, and payments made to individuals participating in Workforce Investment Act programs or any other workforce development program for which eligibility is based upon a needs and/or income test
- Housing and Urban Development (HUD) rental assistance subsidies
- Subsidies for child care made on behalf of a family participating in the child care voucher program administered by the Step Ahead Council
- Certain one-time lump sum payments, assets from sale of home, property, or car; insurance settlement, inheritance, compensation for injury, etc.
- Capital gains and losses
- Income earned while a veteran was on active duty and certain other veterans' benefits, i.e., compensation for service-connected disability, family compensation for service-connected death, vocational rehabilitation, and education assistance
- Tax refunds, gifts, loans, Individual Retirement Account (IRA) withdrawals
- Job Corps payments